

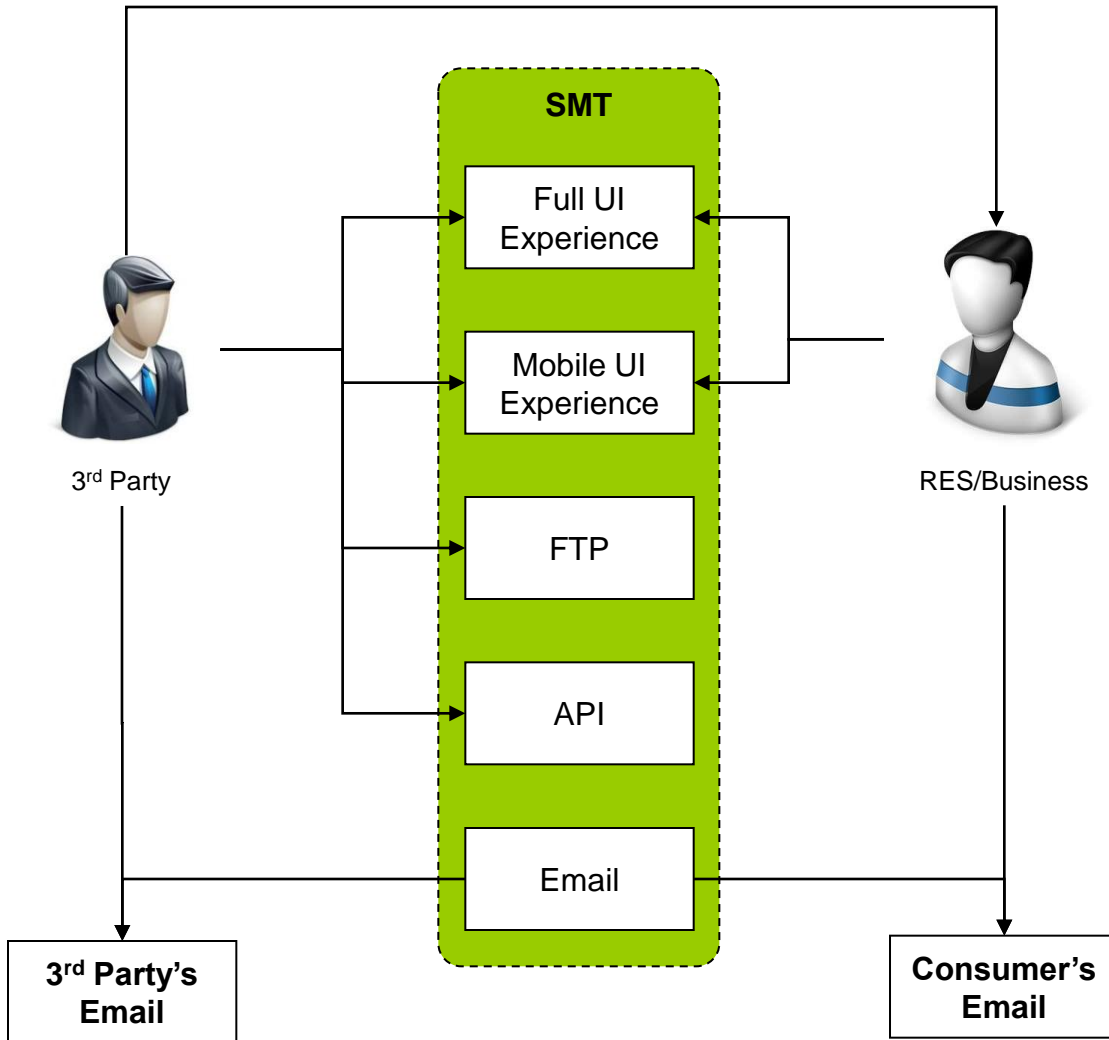
*'Access, Control  
& Convenience'*

# 3<sup>rd</sup> Party Ongoing Relationships

Processes and Storyboards

May 14, 2012

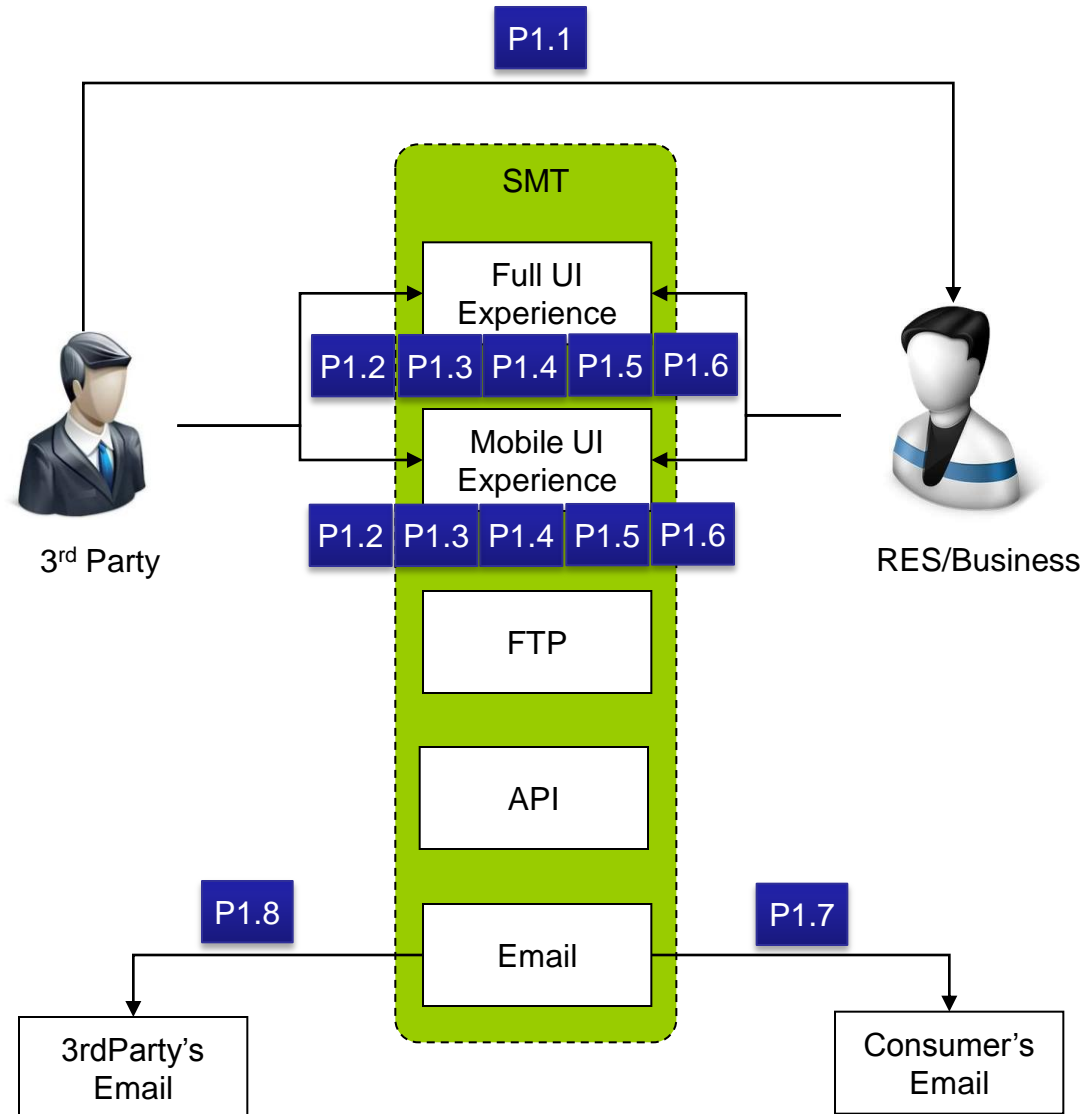
# 3rd Party Phase II and Mobile Processes



## Processes

- P1** 3rd Party Initiates Ongoing Relationship with Customer
- P2** Customer Accepts 3rd Party invite for Ongoing Relationship Agreement
- P3** Customer Views and Manages Ongoing 3rd Party Agreements
- P4** 3rd Party Manages Ongoing Customer Agreements

# 3rd Party Initiates Ongoing Relationship with Customer Process



## Primary Storyboard

**P1.1** 3rd Party meets with RES/Business and collects information (3rd Party, Mobile, 3rd Party LOA)

**P1.2** 3rd Party logs into SMT and navigates to My Account / Customer Agreements, then clicks on Create a new: 'Ongoing Relationship' (3rd Party, Mobile, 3rd Party LOA)

**P1.3** On Create a new: 'Ongoing Relationship' page, 3rd Party enters the RES/Business info collected into SMT UI, clicks affirmation and clicks 'Submit' to initiate the invitation (3rd Party, Mobile, 3rd Party LOA)

**P1.4** If validation is successful, SMT gives success on the UI (3rd Party, Mobile, 3rd Party LOA)

**P1.5** SMT creates and stores Ongoing Relationship Request on SMT and sets status to "Pending" (3rd Party, Mobile, 3rd Party LOA)

**P1.6** SMT creates a non-registered mechanism for RES/Business user to accept Ongoing Relationship invitation (3rd Party Phase II)

**P1.7** SMT sends Ongoing Relationship Request invitation email to RES/Business with a copy of the LOA information provided by 3rd Party (3rd Party, Mobile, 3rd Party LOA)

**P1.8** SMT sends a confirmation email to 3rd Party (3rd Party, Mobile, 3rd Party LOA)

**Note:** 3rd Party must collect from the customer:

- Registered? Yes/No  
If Yes, just User ID

If No,

- Service Address
- City
- State
- Zip Code
- ESID(s)
- Meter #(s)
- Company (if applicable)
- First Name
- Last Name
- Title (if applicable)
- Telephone Number
- Email Address
- Type of HAN Device
- HAN Device MAC Address
- Installation Code
- Business or Residence - needed if customer chooses to register (optional)

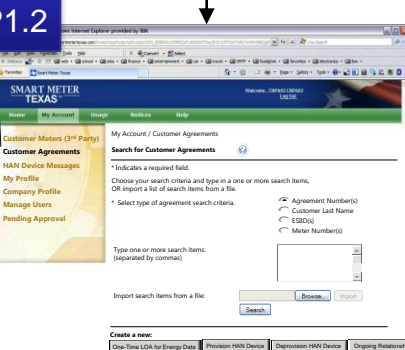
# 3rd Party Initiates Ongoing Relationship with Customer

## Traceability Matrix

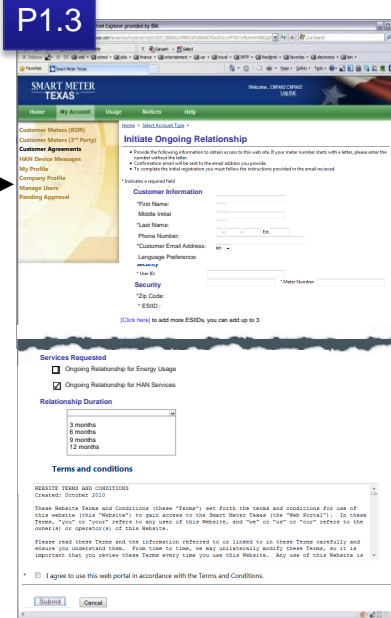
Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
3rd Party	BR – 019.015	<ul style="list-style-type: none"> <li>Ability for 3rd parties, customers, and TDSPs to set up LOAs. Note – This is in place for 3rd parties in 3rd Party Phase 1, Customers have the friends and family functionality, and this will not be implemented for TDSPs</li> </ul>	P1.1	<ul style="list-style-type: none"> <li>3rd Party meets with RES/Business customer and collects information</li> </ul>
3rd Party	BR – 019.015	<ul style="list-style-type: none"> <li>Ability for 3rd parties, customers, and TDSPs to set up LOAs. Note – This is in place for 3rd parties in 3rd Party Phase 1, Customers have the friends and family functionality, and this will not be implemented for TDSPs</li> </ul>	P1.2	<ul style="list-style-type: none"> <li>3rd Party logs into SMT and navigates to My Account / Customer Agreements, then clicks on Create a new: 'Ongoing Relationship'</li> </ul>
3rd Party LOA	BR – 019.012	<ul style="list-style-type: none"> <li>Ability for a 3rd party to attest on the common web portal that they have a Customer authorization (hardcopy or electronic) authorizing them to read only access the Customer's data</li> </ul>	P1.3	<ul style="list-style-type: none"> <li>On Create a new: 'Ongoing Relationship' page, 3rd Party enters the RES/Business info collected into SMT UI, clicks affirmation and clicks 'Submit' to initiate the invitation</li> </ul>
CR 018 Mobile App	N/A	<ul style="list-style-type: none"> <li>Optimize existing SMT User Interface to support a smart phone / smart device browser</li> <li>Extend existing SMT functionality to support multiple mobile phone / device browsers</li> <li>Develop standalone SMT applets for use by a smart phone / smart device</li> </ul>	P1.2 to P1.8	<ul style="list-style-type: none"> <li>See 1.2 – 1.8</li> </ul>

# 3rd Party Initiates Ongoing Relationship with Customer Storyboard

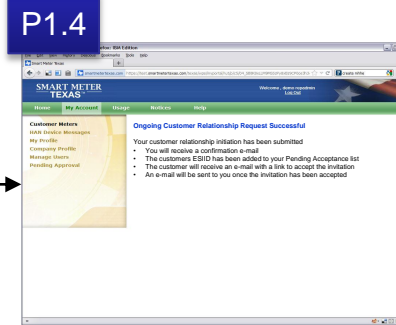
**P1.1** 3rd Party meets with RES/Business and collects information



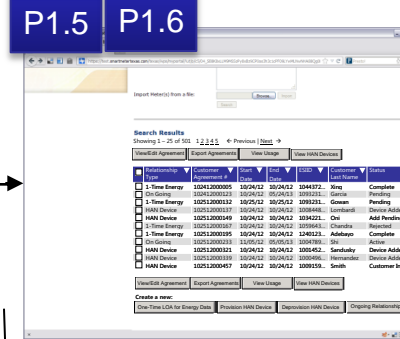
**P1.2** 3rd Party logs into SMT and navigates to My Account / Customer Agreements, then clicks on Create a new: 'Ongoing Relationship'



**P1.3** On Create a new: 'Ongoing Relationship' page, 3rd Party enters the RES/Business info collected into SMT UI, clicks affirmation and clicks 'Submit' to initiate the invitation



**P1.4** If validation is successful, SMT gives success on the UI

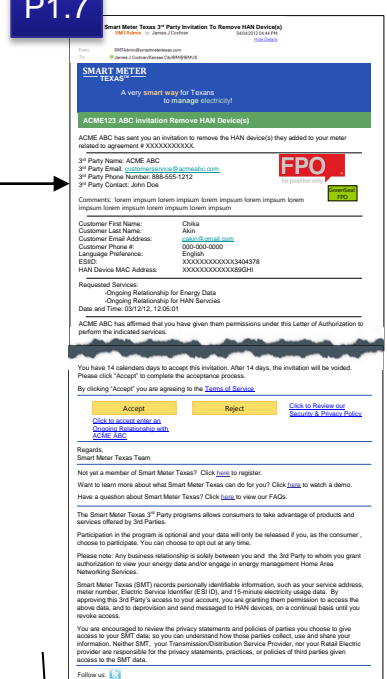


**P1.5** SMT creates and stores Ongoing Relationship Request on SMT and sets status to "Pending"

**P1.6** SMT creates a non-registered mechanism for RES/Business user to accept Ongoing Relationship invitation

**P1.8** 3rd Party Confirmation Email

**P1.8** SMT sends a confirmation email to 3rd Party



**P1.7** SMT sends Ongoing Relationship Request invitation email to RES/Business with a copy of the LOA information provided by 3rd Party

# 3rd Party Initiates Ongoing Relationship with Customer

P1.2

**P1.2** 3rd Party logs into SMT and navigates to My Account / Customer Agreements, then clicks on Create a new: 'Ongoing Relationship'

**Note:** if the user starts the process from a supported smart phone, the link will open the SMT Mobile App if it is installed. If not installed, it opens the browser, which triggers a message asking the user to install the SMT Mobile App for the best experience. The user can choose to continue on the browser. This process applies in all situations for the UI)

The screenshot shows the Smart Meter Texas web application in a Windows Internet Explorer browser window. The address bar shows a test URL. The page has a blue header with the 'SMART METER TEXAS' logo and a 'Welcome, CNPA02 CNPA02' message with a 'Log Out' link. Below the header is a green navigation bar with links: Home, My Account, Usage, Notices, and Help. A sidebar on the left contains a menu with the following items: Customer Meters (3rd Party), Customer Agreements, HAN Device Messages, My Profile, Company Profile, Manage Users, and Pending Approval. The main content area is titled 'My Account / Customer Agreements' and features a 'Search for Customer Agreements' section. This section includes a search criteria selector with radio buttons for Agreement Number(s), Customer Last Name, ESIID(s), and Meter Number(s). Below this is a text input field for search items, separated by commas. There is also a section for importing search items from a file, with a 'Browse...' button and an 'Import' button. At the bottom, there is a 'Create a new:' section with four buttons: One-Time LOA for Energy Data, Provision HAN Device, Deprovision HAN Device, and Ongoing Relationship. A line from the 'Ongoing Relationship' button in the text box points to this button in the screenshot.

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/!ut/p/c5/04\_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1dPF09LYwMLNwNH488Qg0f

File Edit View Favorites Tools Help

Convert Select

Delicious web school jobs finance entertainment car travel SMTP fooddrink favorites electronics ibm

Smart Meter Texas

SMART METER TEXAS™

Welcome, CNPA02 CNPA02

Log Out

Home My Account Usage Notices Help

Customer Meters (3rd Party)

Customer Agreements

HAN Device Messages

My Profile

Company Profile

Manage Users

Pending Approval

My Account / Customer Agreements

Search for Customer Agreements

\* Indicates a required field.

Choose your search criteria and type in a one or more search items, OR import a list of search items from a file.

\* Select type of agreement search criteria.

Agreement Number(s)

Customer Last Name

ESIID(s)

Meter Number(s)

Type one or more search items: (separated by commas)

Import search items from a file:

Browse... Import

Search

Create a new:

One-Time LOA for Energy Data Provision HAN Device Deprovision HAN Device Ongoing Relationship



# 3rd Party Initiates Ongoing Relationship with Customer

P1.3

**P1.3** On Create a new: 'Ongoing Relationship' page, 3rd Party enters the RES/Business info collected into SMT UI...

*continued on the next page*

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/!ut/p/c5/04\_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1dPF09LYwMLNwNH88Qg0f

File Edit View Favorites Tools Help

Convert Select

Delicious web school jobs finance entertainment car travel SMTP fooddrink favorites electronics ibm

Smart Meter Texas

SMART METER TEXAS™

Welcome, CNPA02 CNPA02 [Log Out](#)

Home My Account Usage Notices Help

Home > [Select Account Type](#) >

## Initiate Ongoing Relationship

- Provide the following information to obtain access to this web site. If your meter number starts with a letter, please enter the number without the letter.
- Confirmation email will be sent to the email address you provide.
- To complete the initial registration you must follow the instructions provided in the email recieved.

\* Indicates a required field

### Customer Information

\*First Name:

Middle Initial:

\*Last Name:

Phone Number:  -  -  Ext.

\*Customer Email Address:  lish

Language Preference:

### Security

\* User ID:

\* Zip Code:

\* ESIID :

\* Meter Number:

[\[Click here\]](#) to add more ESIIDs, you can add up to 3

**Note:** 3<sup>rd</sup> Party must collect from the customer:

- Registered? Yes/No  
If Yes, just User ID

If No,

- Service Address
- City
- State
- Zip Code
- ESIID(s)
- Meter #(s)
- Company (if applicable)
- First Name
- Last Name
- Title (if applicable)
- Telephone Number
- Email Address

- Type of HAN Device
- HAN Device MAC Address
- Installation Code
- Business or Residence - needed if customer chooses to register (optional)

Continued on next page

# 3rd Party Initiates Ongoing Relationship with Customer

P1.3

Continued from previous page

**Services Requested**

☐ Ongoing Relationship for Energy Usage

☒ Ongoing Relationship for HAN Services

**Relationship Duration**

3 months  
6 months  
9 months  
12 months

**Terms and conditions**

WEBSITE TERMS AND CONDITIONS  
Created: October 2010

These Website Terms and Conditions (these "Terms") set forth the terms and conditions for use of this website (this "Website") to gain access to the Smart Meter Texas (the "Web Portal"). In these Terms, "you" or "your" refers to any user of this Website, and "we" or "us" or "our" refers to the owner(s) or operator(s) of this Website.

Please read these Terms and the information referred to or linked to in these Terms carefully and ensure you understand them. From time to time, we may unilaterally modify these Terms, so it is important that you review these Terms every time you use this Website. Any use of this Website is

\* ☐ I agree to use this web portal in accordance with the Terms and Conditions.

Submit Cancel

*Continues from previous page*

**P1.3** ... clicks affirmation and clicks 'Submit' to initiate the invitation

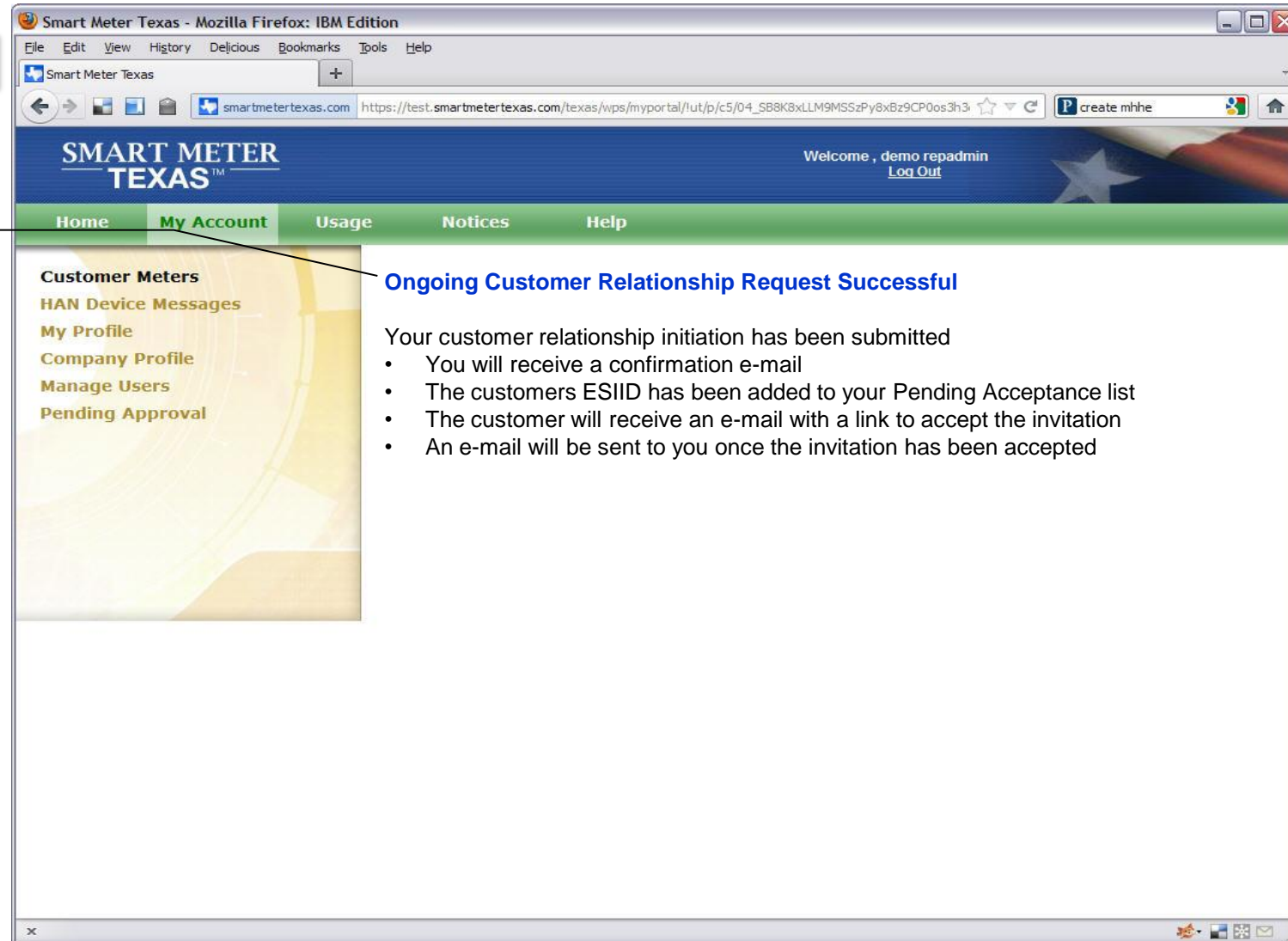
**Note:** Verification process – validation of information provided – will be triggered by 'Submit' button prior to granting access



# 3rd Party Initiates Ongoing Relationship with Customer

P1.4

**P1.4** If validation is successful, SMT gives success on the UI



# 3rd Party Initiates Ongoing Relationship with Customer

P1.5

P1.6

The screenshot shows the 'Smart Meter Texas' web application in a Mozilla Firefox browser. The page displays search results for ongoing relationships. At the top, there is a section for 'Import Meter(s) from a file:' with a 'Browse...' button and an 'Import' button. Below this is a 'Search Results' section showing 'Showing 1 - 25 of 501' results. There are four buttons: 'View/Edit Agreement', 'Export Agreements', 'View Usage', and 'View HAN Devices'. A table lists the search results with columns: Relationship Type, Customer Agreement #, Start Date, End Date, ESIID, Customer Last Name, and Status. The table contains 12 rows of data. Below the table are the same four buttons as above. At the bottom, there is a 'Create a new:' section with four buttons: 'One-Time LOA for Energy Data', 'Provision HAN Device', 'Deprovision HAN Device', and 'Ongoing Relationship'.

<input type="checkbox"/>	Relationship Type	Customer Agreement #	Start Date	End Date	ESIID	Customer Last Name	Status
<input type="checkbox"/>	1-Time Energy	102412000005	10/24/12	10/24/12	1044372...	Xing	Complete
<input type="checkbox"/>	On Going	102412000123	10/24/12	05/24/13	1093231...	Garcia	Pending
<input type="checkbox"/>	1-Time Energy	102512000132	10/25/12	10/25/12	1093231...	Gowan	Pending
<input type="checkbox"/>	HAN Device	102512000137	10/24/12	10/24/12	1008448...	Lombardi	Device Added
<input type="checkbox"/>	HAN Device	102512000149	10/24/12	10/24/12	1034221...	Oni	Add Pending
<input type="checkbox"/>	1-Time Energy	102512000167	10/24/12	10/24/12	1059643...	Chandra	Rejected
<input type="checkbox"/>	1-Time Energy	102512000195	10/24/12	10/24/12	1240123...	Adebayo	Complete
<input type="checkbox"/>	On Going	102512000233	11/05/12	05/05/13	1004789...	Shi	Active
<input type="checkbox"/>	HAN Device	102512000321	10/24/12	10/24/12	1001452...	Sandusky	Device Added
<input type="checkbox"/>	HAN Device	102512000339	10/24/12	10/24/12	1000496...	Hernandez	Device Added
<input type="checkbox"/>	HAN Device	102512000457	10/24/12	10/24/12	1009159...	Smith	Customer Init...

**P1.5** SMT creates and stores Ongoing Relationship Request on SMT and sets status to "Pending"

**P1.6** SMT creates a non-registered mechanism for RES/Business user to accept Ongoing Relationship invitation

# 3rd Party Initiates Ongoing Relationship with Customer

Note: Some of the data will be masked

P1.7

**P1.7** SMT sends Ongoing Relationship Request invitation email to RES/Business with a copy of the LOA information provided by 3rd Party

Note: The content in the example is only for placeholder purposes. This is NOT a draft of the content.

Smart Meter Texas 3<sup>rd</sup> Party Invitation To Remove HAN Device(s)

SMTAdmin to: James J Cochran 04/04/2012 04:44 PM

[Hide Details](#)

From: SMTAdmin@smartmetertexas.com

To: James J Cochran/Kansas City/IBM@IBMUS

**SMART METER TEXAS™**

A very **smart way** for Texans to **manage** electricity!

**ACME123 ABC invitation Remove HAN Device(s)**

ACME ABC has sent you an invitation to remove the HAN device(s) they added to your meter related to agreement # XXXXXXXXXXXX.

3<sup>rd</sup> Party Name: ACME ABC

3<sup>rd</sup> Party Email: [customerservice@acmeabc.com](mailto:customerservice@acmeabc.com)

3<sup>rd</sup> Party Phone Number: 888-555-1212

3<sup>rd</sup> Party Contact: John Doe

Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum

Customer First Name: Chika

Customer Last Name: Akin

Customer Email Address: [cakin@gmail.com](mailto:cakin@gmail.com)

Customer Phone #: 000-000-0000

Language Preference: English

ESID: XXXXXXXXXXXX3404378

Requested Services:

- Ongoing Relationship for Energy Data
- Ongoing Relationship for HAN Services

Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Enhanced Subject line to include the full solution name (e.g. Smart Meter Texas)

Add SMT specific branding for recognition and credibility

Add an introduction line to inform the user of the purpose of the email.

3<sup>rd</sup> Party logo and contact information

Customer Contact Information

LOA Type (Energy Data or HAN deprovision)

3<sup>rd</sup> Party Affirmation

# 3rd Party Initiates Ongoing Relationship with Customer

P1.7

You have 14 calendars days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By clicking "Accept" you are agreeing to the [Terms of Service](#)

Accept

Reject

[Click to Review our Security & Privacy Policy](#)

[Click to accept enter an Ongoing Relationship with ACME ABC](#)

Regards,  
Smart Meter Texas Team

Not yet a member of Smart Meter Texas? Click [here](#) to register.

Want to learn more about what Smart Meter Texas can do for you? Click [here](#) to watch a demo.

Have a question about Smart Meter Texas? Click [here](#) to view our FAQs.


The Smart Meter Texas 3<sup>rd</sup> Party programs allows consumers to take advantage of products and services offered by 3<sup>rd</sup> Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3<sup>rd</sup> Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3<sup>rd</sup> Party's access to your account, you are granting them permission to access the above data, and to deprovision and send messages to HAN devices, on a continual basis until you revoke access.

You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

Follow us: 

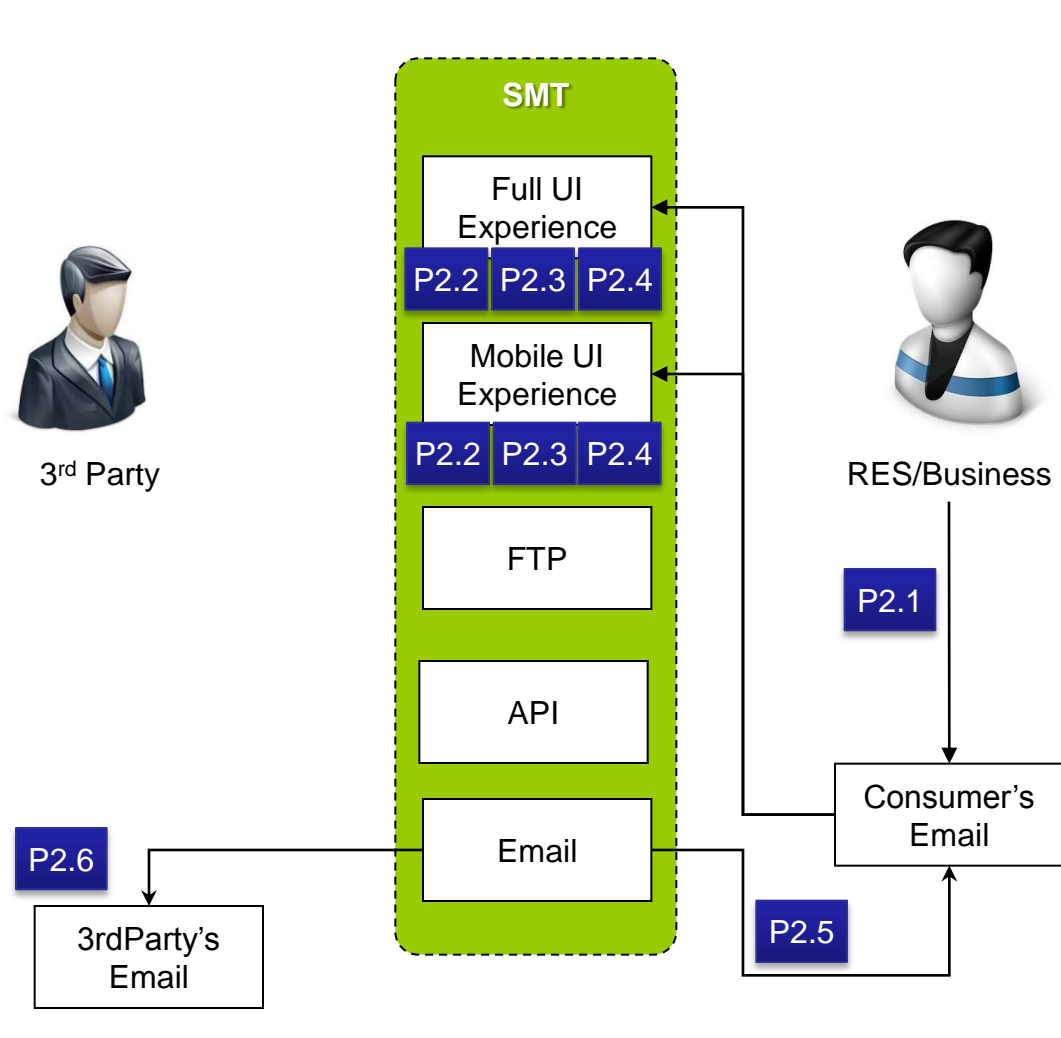
Provide a section for references back to SMT to drive awareness and adoption.

Provide a section, specific to the type of email, for communicating disclaimers, terms and conditions, as needed.

Provide a section for links back to Smart Meter Texas news flashes and announcements on Twitter

Might want a note that states, Registration is not necessary.

# Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement Process



## Primary Storyboard

- P2.1** RES/Business user opens email and clicks on “Accept” to start the acceptance process for the relationship (3rd Party, Mobile, 3rd Party LOA)
- P2.2** SMT presents a Ongoing Relations acceptance process page to RES/Business user (3rd Party, Mobile, 3rd Party LOA)
  - P2.2.1** If registered and logged in, SMT will present a Ongoing Relationship Accepted Page
  - P2.2.2** If registered but not logged in, the RES/Business is presented an Ongoing Relationship Acceptance page that ask the user to login to complete the acceptance (3rd Party, Mobile, 3rd Party LOA)
  - P2.2.3** If not registered, the RES/Business is presented an Ongoing Relationship Acceptance page that takes him through the registration process to complete the acceptance process (3rd Party, Mobile, 3rd Party LOA)
- P2.3** SMT Ongoing Relationship Accepted is presented on the UI (3rd Party, Mobile, 3rd Party LOA)
- P2.4** The new relationship shows up with “Active” status for RES/Business under My 3rd Parties and for 3rd Parties under Customer Agreements in the SMT UI (3rd Party, Mobile, 3rd Party LOA)
- P2.5** SMT sends a confirmation email to the RES/Business user indicating that the Ongoing Relationship has been established (3rd Party, Mobile, 3rd Party LOA)
- P2.6** SMT sends a notification email to the 3rd party that the Ongoing Relationship has been established (3rd Party, Mobile, 3rd Party LOA)

# Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
3 <sup>rd</sup> Party	BR – 019	<ul style="list-style-type: none"> <li>Ability for a Customer to electronically authorize release of usage data to a 3rd party (i.e. someone other than the Rep of Record - either a REP, aggregator, or registered 3rd party).</li> </ul>	P2.1	<ul style="list-style-type: none"> <li>RES/Business user opens email and clicks on “Accept” to start the acceptance process for the relationship</li> </ul>
3rd Party LOA	BR – 019.012	<ul style="list-style-type: none"> <li>Ability for a 3rd party to attest on the common web portal that they have a Customer authorization (hardcopy or electronic) authorizing them to read only access the Customer’s data</li> </ul>	P2.1	<ul style="list-style-type: none"> <li>RES/Business user opens email and clicks on “Accept” to start the acceptance process for the relationship</li> </ul>
3 <sup>rd</sup> Party	BR – 301	<ul style="list-style-type: none"> <li>Ability for a Customer to select multiple registered 3rd parties to have limited time based read only access, with a default expiration of 6 months, to their usage data on the common web portal for a single ESIID</li> </ul>	P2.4 Note	<ul style="list-style-type: none"> <li>From here, RES/Business user can select multiple registered 3rd parties and edit access</li> </ul>
3 <sup>rd</sup> Party	BR – 019.014	<ul style="list-style-type: none"> <li>Ability for 3<sup>rd</sup> parties and / or Customers to receive a notification when access has been granted, access has been changed, or access has been revoked for an ESIID</li> </ul>	P2.6, 2.7	<ul style="list-style-type: none"> <li>SMT sends a confirmation email to the RES/Business user (with copy of LOA) indicating that the relationship has been established</li> <li>SMT sends a notification email to the 3rd party that the LOA has been accepted</li> </ul>



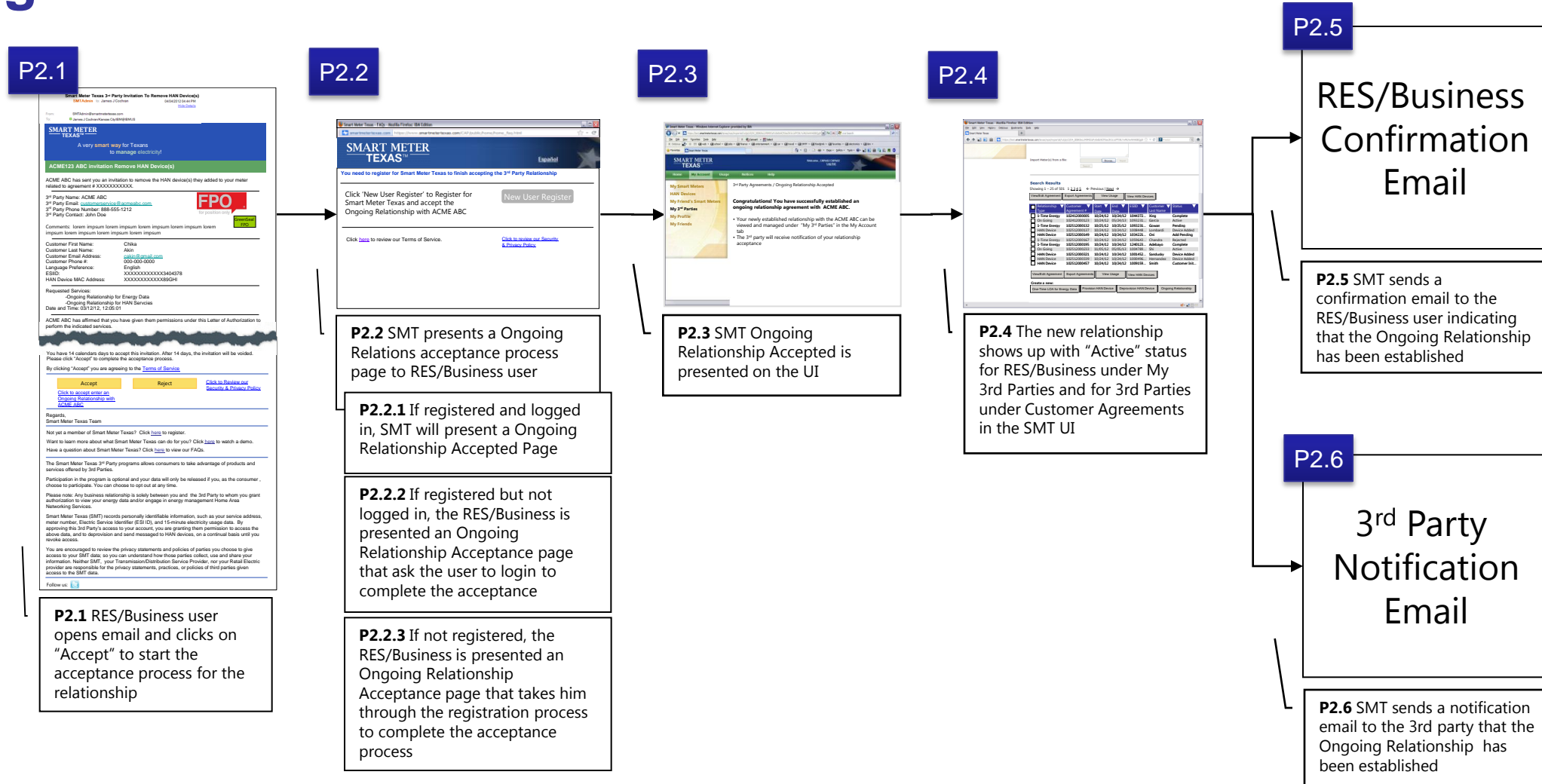
# Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
3 <sup>rd</sup> Party GUI	BR – 081.003	<ul style="list-style-type: none"> <li>▪Ability for an authorized user to select a Provisioned HAN Device or pending Provision request, from a list displayed on the common Web Portal, for purposes of De-Provisioning a Provisioned HAN Device or deleting the pending Provision request</li> </ul>	P2.5 Note	<ul style="list-style-type: none"> <li>• From here, RES/Business user can select multiple registered 3rd parties and edit access</li> </ul>
CR 018 Mobile App	N/A	<ul style="list-style-type: none"> <li>▪Optimize existing SMT User Interface to support a smart phone / smart device browser</li> <li>▪Extend existing SMT functionality to support multiple mobile phone / device browsers</li> <li>▪Develop standalone SMT applets for use by a smart phone / smart device</li> </ul>	P2.2 – P2.6	<ul style="list-style-type: none"> <li>▪ The RES/Business user is taken to SMT</li> <li>▪ If registered, the RES/Business user logs into SMT, Reviews LOA and clicks "Accept"</li> <li>▪ If not registered, the RES/Business goes through the registration process – reviews Registration page pre-populated with LOA information provided by 3rd Party. enters unique User ID, accepts Ts&amp;Cs and clicks 'Finish</li> </ul>
ADA	N/A	<ul style="list-style-type: none"> <li>▪Limit the number of digits of ESIID (to last 6 or 8 digits) that customers have to enter during registration</li> </ul>	P2.3, P2.4, P2.5	<ul style="list-style-type: none"> <li>▪ Login/completion of registration triggers the completion of the acceptance process, depending on type of LOA requested</li> <li>▪ SMT gives success/LOA confirmation on the UI</li> <li>▪ The new relationship shows up with “Active” status for RES/Business and 3rd Parties under 3rd Party relationships in the SMT UI</li> </ul>

# Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
<div>HAN Functions – Permissions 3rd Party Phase II</div>	<div>BR – 401</div>	<ul style="list-style-type: none"><li>▪ Ability for the customer to indicate who has permission to control (provision, de-provision, message) their HAN device (i.e. customer only, customer and ROR, customer and 3rd party, customer and TDSP, or any combination of the above with the customer)</li></ul>	<div>P2.5 Note</div>	<ul style="list-style-type: none"><li>• From here, RES/Business user can select multiple registered 3rd parties and edit access</li></ul>

## Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement



# Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement

P2.1

Smart Meter Texas 3<sup>rd</sup> Party Invitation To Remove HAN Device(s)  
SMTAdmin To: James J Cochran 04/04/2012 04:44 PM  
[Hide Details](#)

From: SMTAdmin@smartmetertexas.com  
To: James J Cochran/Kansas City/EMUS

A very smart way for Texans to manage electricity!

ACME123 ABC invitation Remove HAN Device(s)

ACME ABC has sent you an invitation to remove the HAN device(s) they added to your meter related to agreement # XXXXXXXXXXXX.

3<sup>rd</sup> Party Name: ACME ABC  
3<sup>rd</sup> Party Email: [customerservice@acmeabc.com](mailto:customerservice@acmeabc.com)  
3<sup>rd</sup> Party Phone Number: 888-555-1212  
3<sup>rd</sup> Party Contact: John Doe

Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum  
lorem ipsum lorem ipsum lorem ipsum

Customer First Name:	Chika
Customer Last Name:	Akin
Customer Email Address:	<a href="mailto:cakin@gmail.com">cakin@gmail.com</a>
Customer Phone #:	000-000-0000
Language Preference:	English
ESID:	XXXXXXXXXXXX3404378
HAN Device MAC Address:	XXXXXXXXXXXX89GHI

Requested Services:  
-Ongoing Relationship for Energy Data  
-Ongoing Relationship for HAN Services  
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

You have 14 calendars days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By clicking "Accept" you are agreeing to the [Terms of Service](#)

Accept

Reject

[Click to Review our Security & Privacy Policy](#)  
[Click to accept enter an Ongoing Relationship with ACME ABC](#)

Regards,  
Smart Meter Texas Team

Not yet a member of Smart Meter Texas? Click [here](#) to register.

Want to learn more about what Smart Meter Texas can do for you? Click [here](#) to watch a demo.

Have a question about Smart Meter Texas? Click [here](#) to view our FAQs.

The Smart Meter Texas 3<sup>rd</sup> Party programs allows consumers to take advantage of products and services offered by 3<sup>rd</sup> Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3<sup>rd</sup> Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3<sup>rd</sup> Party's access to your account, you are granting them permission to access the above data, and to deprovision and send messages to HAN devices, on a continual basis until you revoke access.

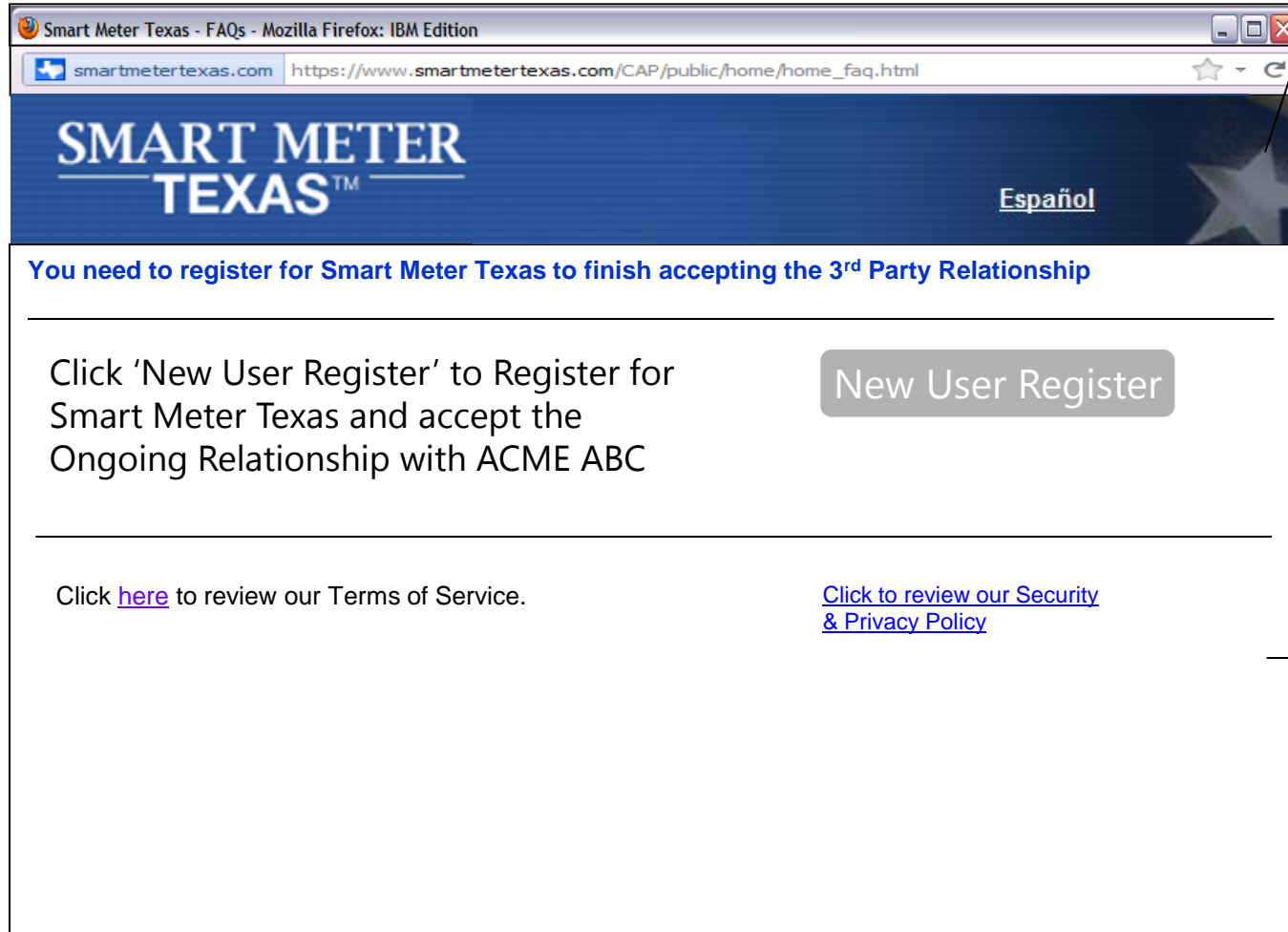
You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

Follow us:

**P2.1** RES/Business user opens email and clicks on "Accept" to start the acceptance process for the relationship

# Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement

P2.2



**P2.2** SMT presents a Ongoing Relations acceptance process page to RES/Business user

**P2.2.1** If registered and logged in, SMT will present a Ongoing Relationship Accepted Page

**P2.2.2** If registered but not logged in, the RES/Business is presented an Ongoing Relationship Acceptance page that ask the user to login to complete the acceptance

**P2.2.3** If not registered, the RES/Business is presented an Ongoing Relationship Acceptance page that takes him through the registration process to complete the acceptance process

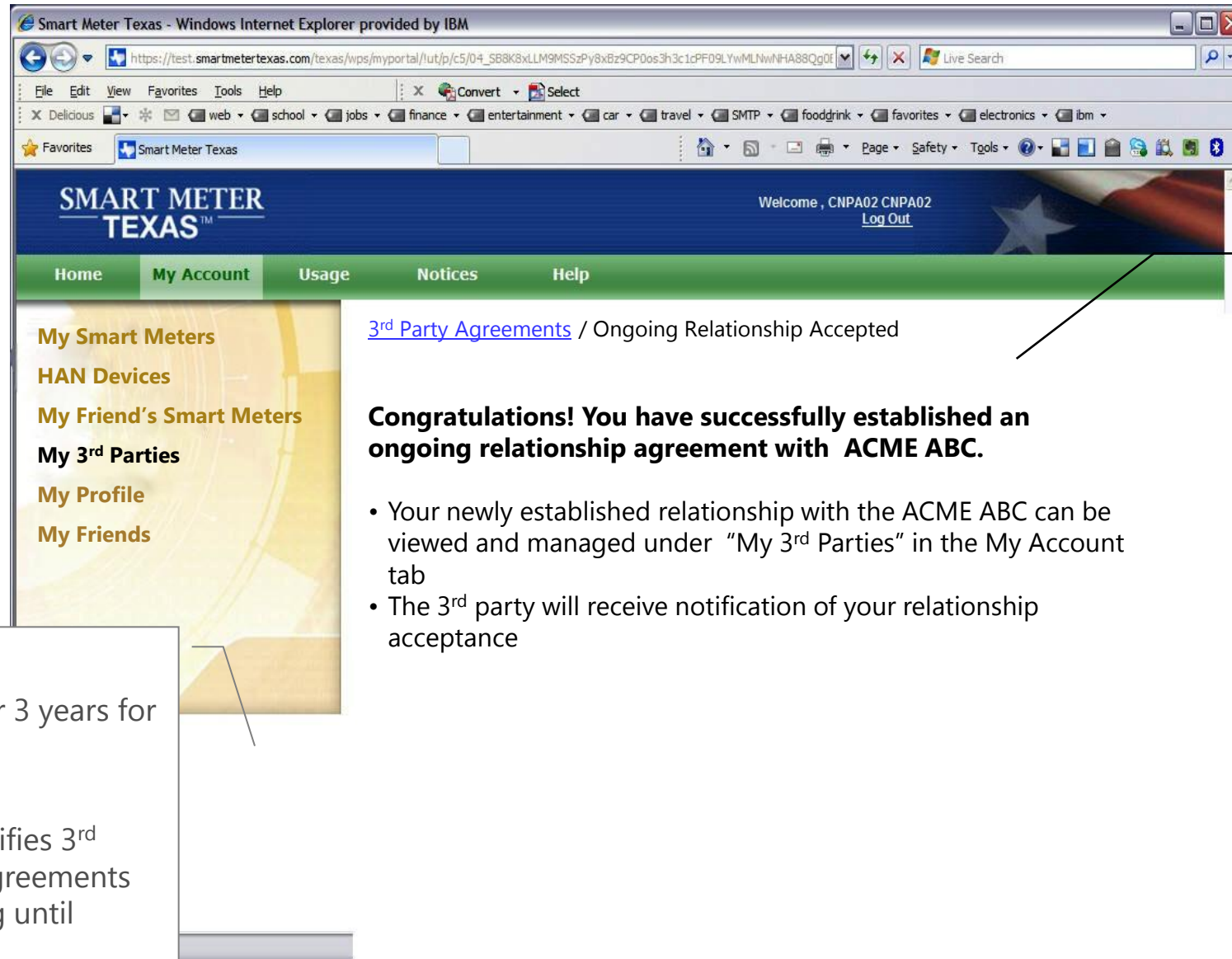
# Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement

P2.3

**Note:** RES/Business users can find, select and edit 3<sup>rd</sup> Party agreements from My Account / My 3<sup>rd</sup> Parties

## Notes:

1. Agreements are retained for 3 years for audit purposes
2. Lifecycle Rule: SMT scans all agreements nightly and notifies 3<sup>rd</sup> Parties and Customers of agreements that have 30 days remaining until relationship expires



[3<sup>rd</sup> Party Agreements](#) / Ongoing Relationship Accepted

**Congratulations! You have successfully established an ongoing relationship agreement with ACME ABC.**

- Your newly established relationship with the ACME ABC can be viewed and managed under "My 3<sup>rd</sup> Parties" in the My Account tab
- The 3<sup>rd</sup> party will receive notification of your relationship acceptance

**P2.3 SMT Ongoing Relationship Accepted is presented on the UI**



# Customer Accepts 3rd Party Invite for Ongoing Relationship Agreement

P2.4

**P2.4** The new relationship shows up with "Active" status for RES/Business under My 3rd Parties and for 3rd Parties under Customer Agreements in the SMT UI

**Note:** RES/Business users can find, select and edit 3<sup>rd</sup> Party agreements from My Account / My 3<sup>rd</sup> Parties

Smart Meter Texas - Mozilla Firefox: IBM Edition

Smart Meter Texas

https://test.smartmeter.texas.com/texas/wps/myportal/!ut/p/c5/04\_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0I

Import Meter(s) from a file:

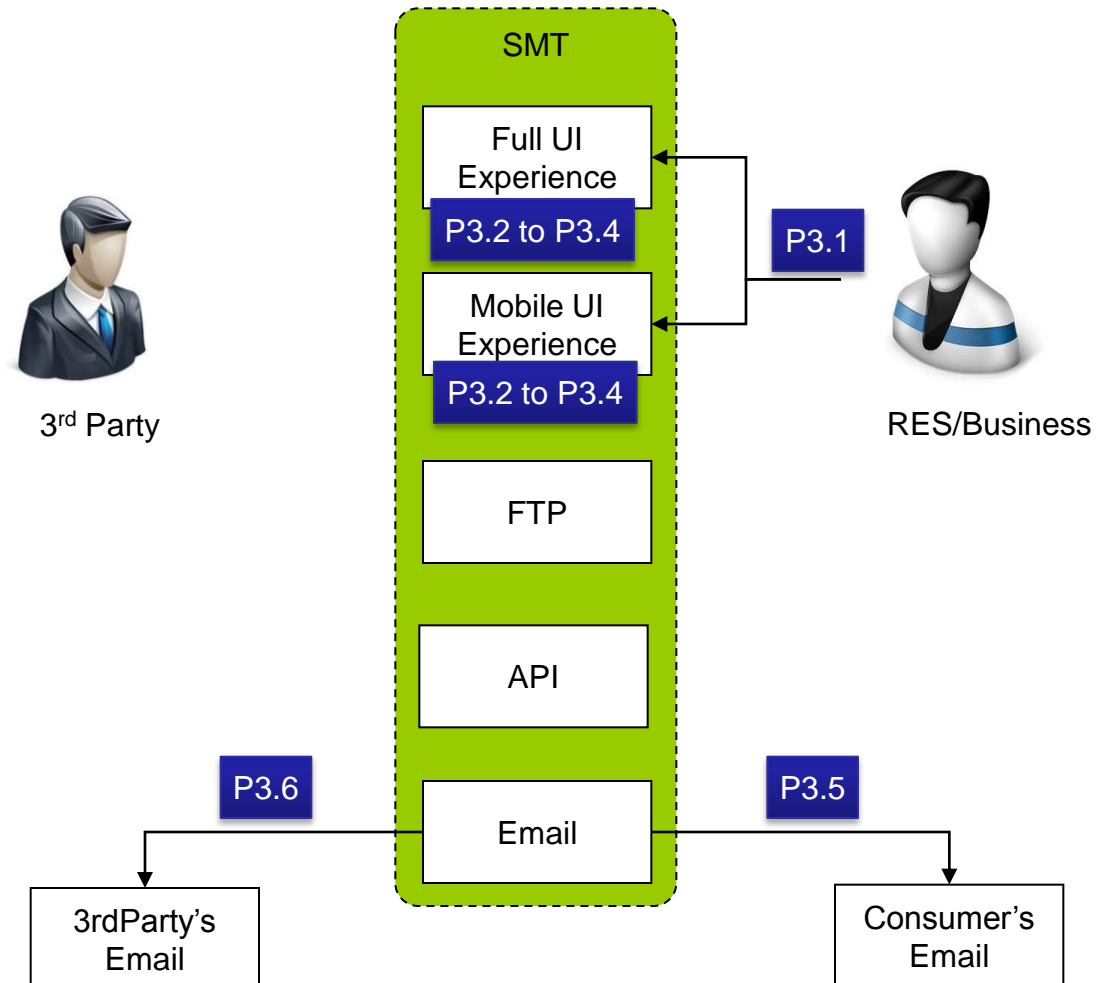
**Search Results**

Showing 1 – 25 of 501 1 2 3 4 5 ← Previous | Next →

<input type="checkbox"/>	Relationship Type	Customer Agreement #	Start Date	End Date	ESIID	Customer Last Name	Status
<input type="checkbox"/>	1-Time Energy	102412000005	10/24/12	10/24/12	1044372...	Xing	Complete
<input type="checkbox"/>	On Going	102412000123	10/24/12	05/24/13	1093231...	Garcia	Active
<input type="checkbox"/>	1-Time Energy	102512000132	10/25/12	10/25/12	1093231...	Gowan	Pending
<input type="checkbox"/>	HAN Device	102512000137	10/24/12	10/24/12	1008448...	Lombardi	Device Added
<input type="checkbox"/>	HAN Device	102512000149	10/24/12	10/24/12	1034221...	Oni	Add Pending
<input type="checkbox"/>	1-Time Energy	102512000167	10/24/12	10/24/12	1059643...	Chandra	Rejected
<input type="checkbox"/>	1-Time Energy	102512000195	10/24/12	10/24/12	1240123...	Adebayo	Complete
<input type="checkbox"/>	On Going	102512000233	11/05/12	05/05/13	1004789...	Shi	Active
<input type="checkbox"/>	HAN Device	102512000321	10/24/12	10/24/12	1001452...	Sandusky	Device Added
<input type="checkbox"/>	HAN Device	102512000339	10/24/12	10/24/12	1000496...	Hernandez	Device Added
<input type="checkbox"/>	HAN Device	102512000457	10/24/12	10/24/12	1009159...	Smith	Customer Init...

**Create a new:**

# Customer Views and Manages 3rd Party Agreements Process



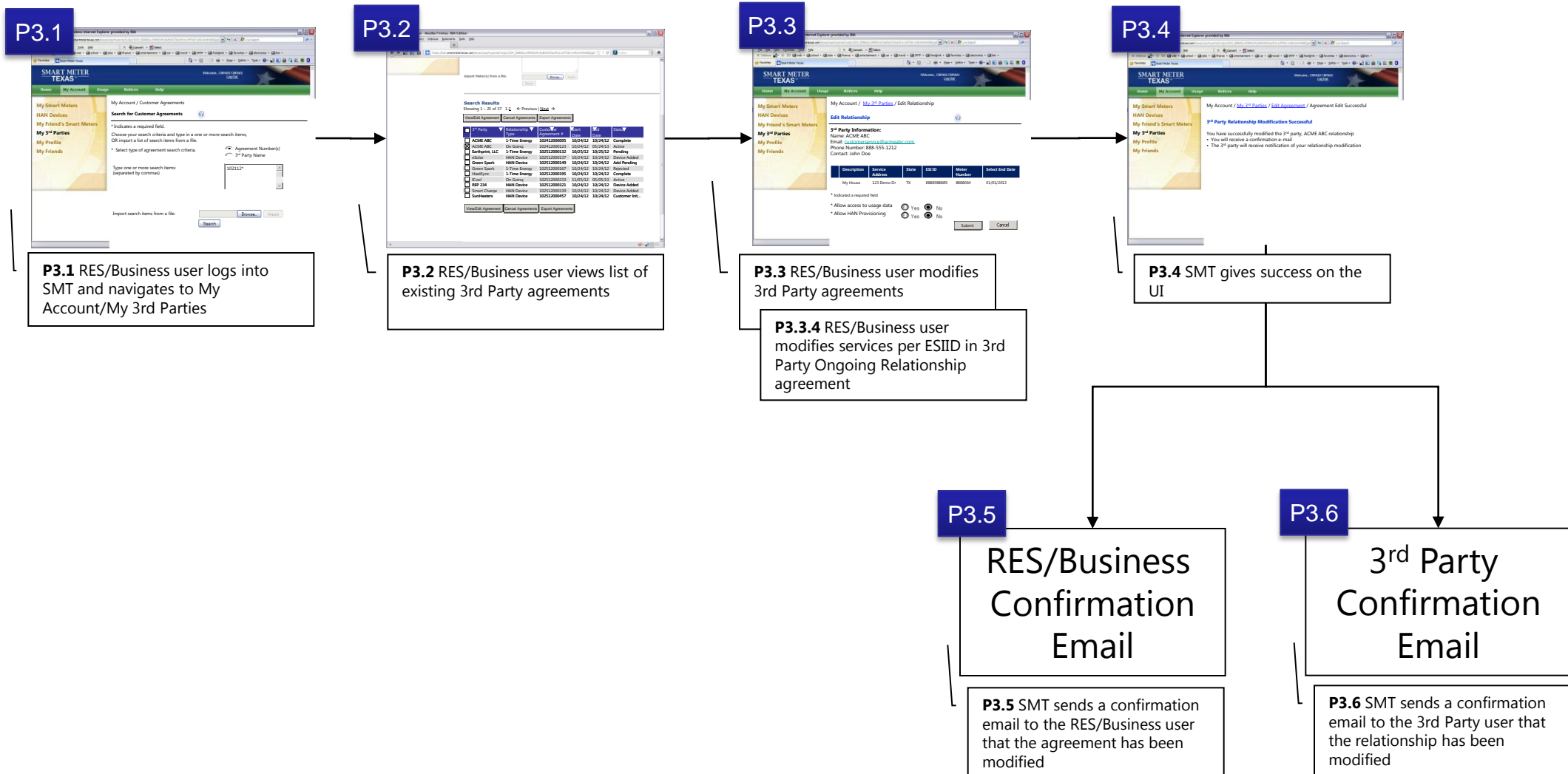
## Primary Storyboard

- P3.1** RES/Business user logs into SMT and navigates to My Account/My 3rd Parties (3rd Party, Mobile, 3rd Party LOA)
- P3.2** RES/Business user views list of existing 3rd Party agreements (3rd Party, Mobile, 3rd Party LOA)
- P3.3** RES/Business user modifies 3rd Party agreements (3rd Party, Mobile, 3rd Party LOA)
  - P3.3.1** RES/Business user views list of existing 3rd Party agreements
  - P3.3.2** RES/Business user modifies 3rd Party Ongoing Relationship agreement end date
  - P3.3.3** RES/Business user modifies ESIIDs in 3rd Party Ongoing Relationship agreement
  - P3.3.4** RES/Business user modifies services per ESIID in 3rd Party Ongoing Relationship agreement
  - P3.4.5** RES/Business user terminates existing 3rd Party Ongoing Relationship agreement
  - P3.4.6** RES/Business user de-provisions HAN Device in 3rd Party Agreement
- P3.4** SMT gives success on the UI (3rd Party, Mobile, 3rd Party LOA)
- P3.5** SMT sends a confirmation email to the RES/Business user that the agreement has been modified (3rd Party, Mobile, 3rd Party LOA)
- P3.6** SMT sends a confirmation email to the 3rd Party user that the relationship has been modified (3rd Party, Mobile, 3rd Party LOA)

# Customer Views and Manages 3rd Party Agreements Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party Phase II and Mobile #	Process Description
3 <sup>rd</sup> Party Phase I	BR – 019.008	<ul style="list-style-type: none"> <li>Ability for the Customer to actively select a specific expiration date or unlimited access timeframe for 3rd party access other than the default of 6 months</li> </ul>	P3.4.2	<ul style="list-style-type: none"> <li>RES/Business user modifies 3rd Party relationship end date</li> </ul>
3 <sup>rd</sup> Party Phase II	BR – 301	<ul style="list-style-type: none"> <li>Ability for a Customer to select multiple registered 3rd parties to have limited time based read only access, with a default expiration of 6 months, to their usage data on the common web portal for a single ESIID</li> </ul>	P3.4	<ul style="list-style-type: none"> <li>RES/Business user modifies 3rd Party relationships - sub storyboards apply</li> </ul>
3 <sup>rd</sup> Party Phase I	BR – 019.010	<ul style="list-style-type: none"> <li>Ability for the Customer to electronically allow select / revoke which 3rd parties are authorized for read-only access to their data</li> </ul>	P3.4.4	<ul style="list-style-type: none"> <li>RES/Business user modifies services per ESIID in 3<sup>rd</sup> Party relationship</li> </ul>
3 <sup>rd</sup> Party Phase I	BR – 019.014	<ul style="list-style-type: none"> <li>Ability for 3<sup>rd</sup> parties and / or Customers to receive a notification when access has been granted, access has been changed, or access has been revoked for an ESIID</li> </ul>	P3.4.4	<ul style="list-style-type: none"> <li>SMT sends a confirmation email to the 3rd Party/RES user that the relationship has been modified</li> </ul>
CR 018 Mobile App	N/A	<ul style="list-style-type: none"> <li>Optimize existing SMT User Interface to support a smart phone / smart device browser</li> <li>Extend existing SMT functionality to support multiple mobile phone / device browsers</li> <li>Develop standalone SMT applets for use by a smart phone / smart device</li> </ul>	P3.2, P3.3, P3.4, P3.5	<ul style="list-style-type: none"> <li>RES/Business user navigates to My Account/My 3rd Party Relationships</li> <li>RES/Business user views list of existing 3rd Party relationships</li> <li>RES/Business user modifies 3rd Party relationships - sub storyboards apply</li> <li>SMT gives success on the UI</li> </ul>

# Customer Views and Manages 3rd Party Agreements Storyboard



# Consumer Views and Manages 3rd Party Agreements

## P3.1

RES/Business user logs into SMT and navigates to My Account/My 3rd Parties

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https://test.smartmetertexas.com/texas/wps/myportal/ut/p/c5/04\_S68K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0f

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Home My Account Usage Notices Help

**My Smart Meters**

**HAN Devices**

**My Friend's Smart Meters**

**My 3<sup>rd</sup> Parties**

**My Profile**

**My Friends**

My Account / Customer Agreements

**Search for Customer Agreements**

\* Indicates a required field.

Choose your search criteria and type in a one or more search items,  
OR import a list of search items from a file.

\* Select type of agreement search criteria.

☒ Agreement Number(s)

☐ 3<sup>rd</sup> Party Name

Type one or more search items:  
(separated by commas)

Import search items from a file:

# Consumer Views and Manages 3rd Party Agreements

**P3.2** RES/Business user views list of existing 3rd Party agreements

The screenshot shows the 'Smart Meter Texas - Mozilla Firefox: IBM Edition' browser window. The address bar displays the URL: [https://test.smartmetertexas.com/texas/wps/myportal/lut/p/c5/04\\_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0I](https://test.smartmetertexas.com/texas/wps/myportal/lut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0I). The page features a search bar and a 'Search' button. Below the search bar, there are three buttons: 'View/Edit Agreement', 'Cancel Agreements', and 'Export Agreements'. The main content area displays a table of 3rd party agreements.

<input type="checkbox"/>	3 <sup>rd</sup> Party ▼	Relationship Type ▼	Customer Agreement #	Start Date	End Date	Status ▼
<input type="checkbox"/>	ACME ABC	1-Time Energy	102412000005	10/24/12	10/24/12	Complete
<input checked="" type="checkbox"/>	ACME ABC	On Going	102412000123	10/24/12	05/24/13	Active
<input type="checkbox"/>	Earthprint, LLC	1-Time Energy	102512000132	10/25/12	10/25/12	Pending
<input type="checkbox"/>	eSolar	HAN Device	102512000137	10/24/12	10/24/12	Device Added
<input type="checkbox"/>	Green Spark	HAN Device	102512000149	10/24/12	10/24/12	Add Pending
<input type="checkbox"/>	Green Spark	1-Time Energy	102512000167	10/24/12	10/24/12	Rejected
<input type="checkbox"/>	HeatSync	1-Time Energy	102512000195	10/24/12	10/24/12	Complete
<input type="checkbox"/>	ICool	On Going	102512000233	11/05/12	05/05/13	Active
<input type="checkbox"/>	REP 234	HAN Device	102512000321	10/24/12	10/24/12	Device Added
<input type="checkbox"/>	Smart Charge	HAN Device	102512000339	10/24/12	10/24/12	Device Added
<input type="checkbox"/>	SunHeaters	HAN Device	102512000457	10/24/12	10/24/12	Customer Init...

Below the table, there are three buttons: 'View/Edit Agreement', 'Cancel Agreements', and 'Export Agreements'.



# Customer Views and Manages 3rd Party Agreements

Note: If the agreement expires or is terminated Party access to ongoing Ad Hoc Energy Usage and HAN Messaging Services is removed, but HAN Devices remain provisioned.

Note: Customer will be able to extend the agreement up to 1 year from the current date

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/tut/p/c5/04\_S68K8xLLM9MSSzPy8x6z9CP0os3h3c1cPF09LYwMLNwNHA88Qg0E

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My Smart Meters  
HAN Devices  
My Friend's Smart Meters  
My 3<sup>rd</sup> Parties  
My Profile  
My Friends

My Account / [My 3<sup>rd</sup> Parties](#) / Edit Relationship

**Edit Relationship**

**3<sup>rd</sup> Party Information:**  
Name: ACME ABC  
Email: [customerservice@acmeabc.com](mailto:customerservice@acmeabc.com)  
Phone Number: 888-555-1212  
Contact: John Doe

Description	Service Address	State	ESI ID	Meter Number	Select End Date
My House	123 Demo Dr	TX	8888988889	8888064	01/01/2013

\* Indicated a required field

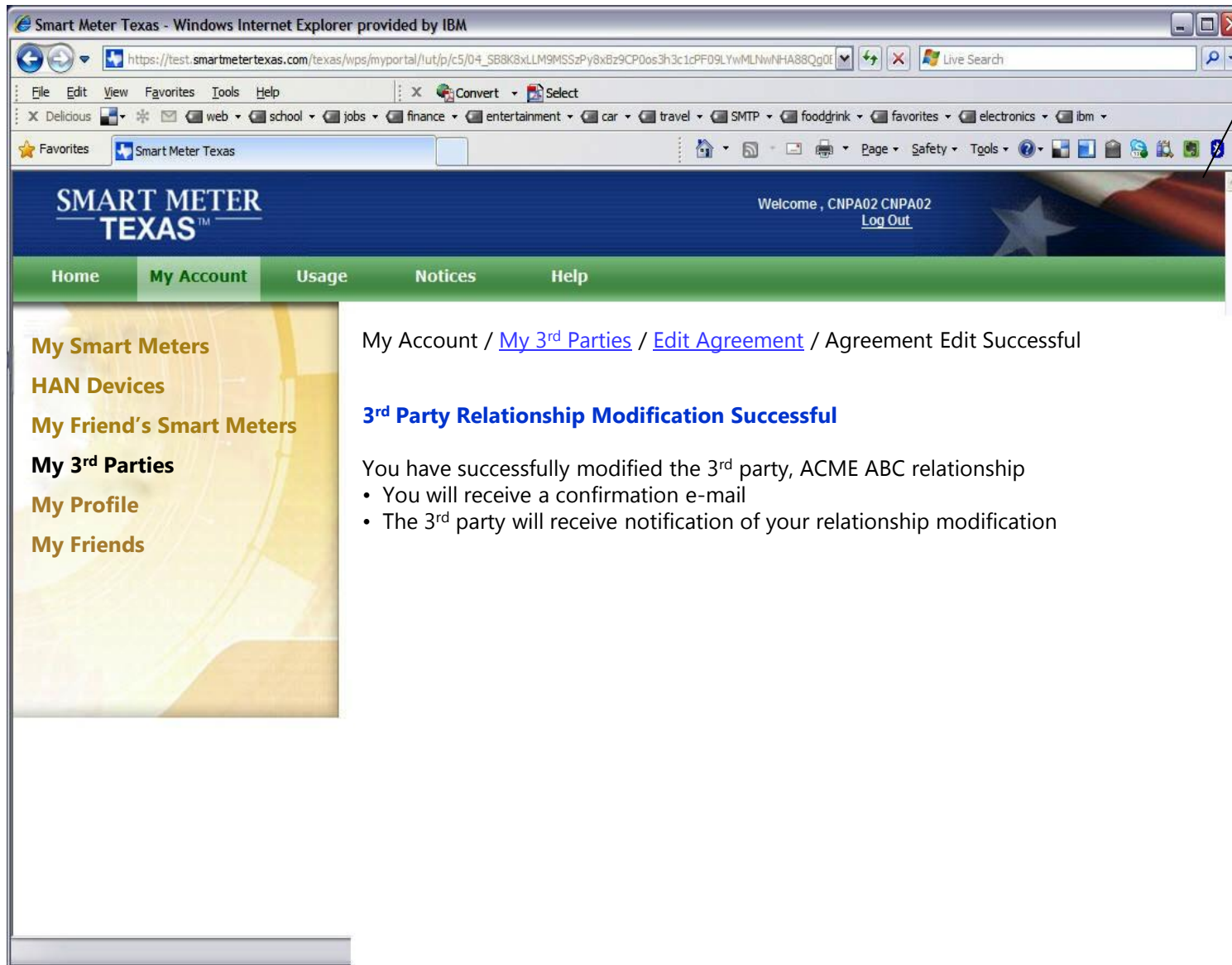
\* Allow access to usage data ☐ Yes ☒ No

\* Allow HAN Provisioning ☐ Yes ☒ No

**P3.3** RES/Business user modifies 3rd Party agreements

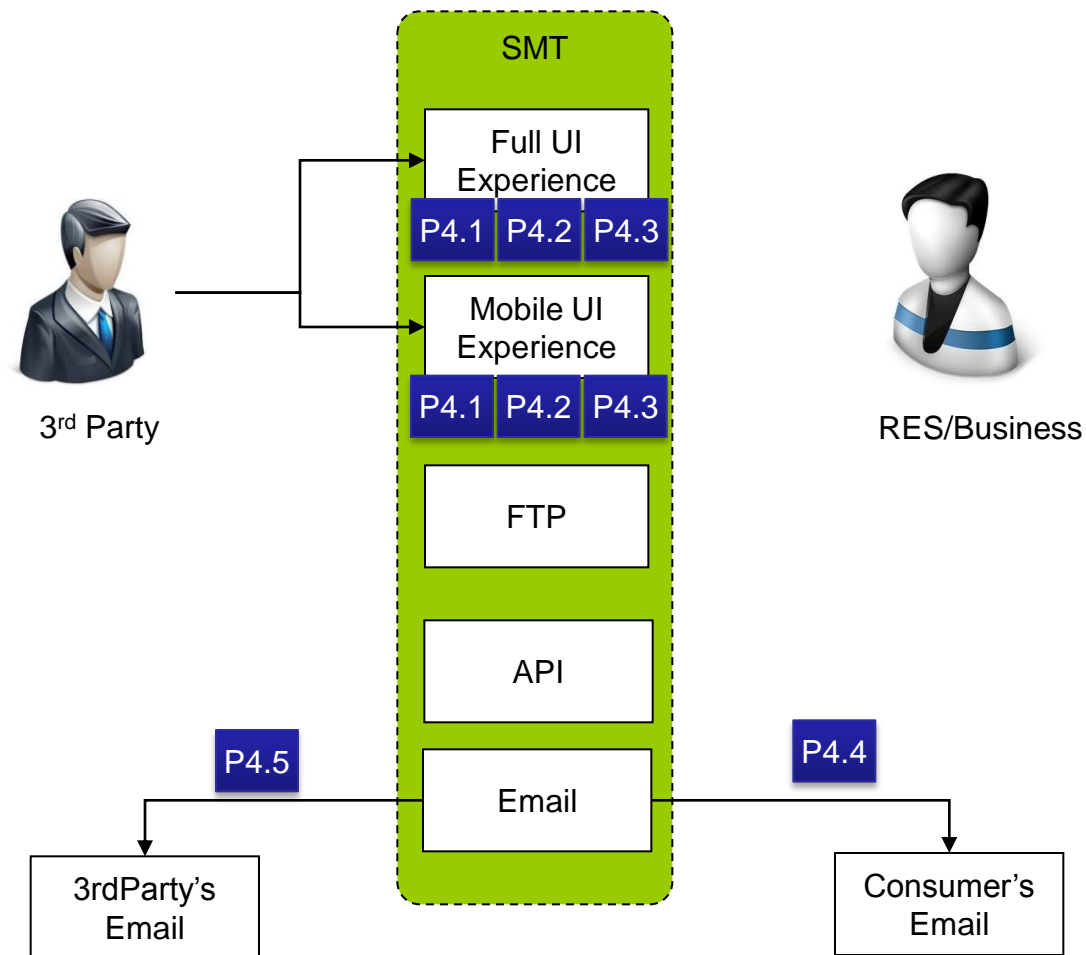
**P3.3.4** RES/Business user modifies services per ESIID in 3rd Party Ongoing Relationship agreement

# Customer Views and Manages Ongoing 3rd Party Agreements



**P3.4** SMT gives success on the UI

# 3rd Party Views and Manages Ongoing Customer Agreements Process



## Primary Storyboard

- P4.1** 3rd Party user logs and navigates to My Account / Customer Agreements  
(3rd Party, Mobile, 3rd Party LOA)
- P4.2** 3rd Party user views list of existing Customer Agreements  
(3rd Party, Mobile, 3rd Party LOA)
- P4.3** 3rd Party user edits Ongoing Agreements  
(3rd Party, Mobile, 3rd Party LOA)
- P4.4** SMT sends a confirmation email to the RES/Business user that the agreement has been modified  
(3rd Party, Mobile, 3rd Party LOA)
- P4.5** SMT sends a confirmation email to the RES/Business user that the agreement has been modified  
(3rd Party, Mobile, 3rd Party LOA)

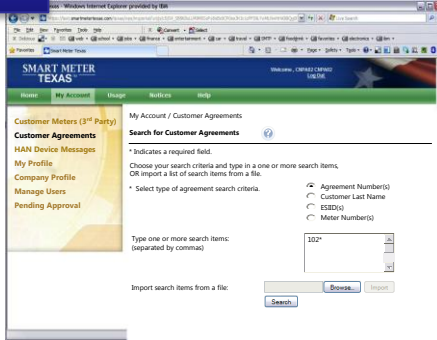
# 3rd Party Views and Manages Ongoing Customer Agreements Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
3 <sup>rd</sup> Party	BR – 303	<ul style="list-style-type: none"> <li>Ability for 3rd parties to request a report via API of all the ESIIDs they are authorized to view</li> </ul>	P4.3	<ul style="list-style-type: none"> <li>3rd Party user views list of existing 3rd Party relationships</li> </ul>
3 <sup>rd</sup> Party	BR – 019.016	<ul style="list-style-type: none"> <li>Ability for 3rd parties to search and view a list of the ESIIDs they are authorized to view <b>Note</b> – In 3rd Party Phase 1, a 3rd party can request the list of ESIIDs they are authorized for</li> </ul>	P4.3	<ul style="list-style-type: none"> <li>3rd Party user views list of existing 3rd Party relationships</li> </ul>
3 <sup>rd</sup> Party LOA	BR – 019.012	<ul style="list-style-type: none"> <li>Ability for a 3rd party to attest on the common web portal that they have a Customer authorization (hardcopy or electronic) authorizing them to read only access the Customer's data. <b>Note</b> – a security validation needs to be developed for this capability, 3rd Parties can't log onto the web portal</li> </ul>	P4.3	<ul style="list-style-type: none"> <li>3rd Party user views list of existing 3rd Party relationships</li> </ul>
CR 018 Mobile App	N/A	<ul style="list-style-type: none"> <li>Optimize existing SMT User Interface to support a smart phone / smart device browser</li> <li>Extend existing SMT functionality to support multiple mobile phone / device browsers</li> <li>Develop standalone SMT applets for use by a smart phone / smart device</li> </ul>	P4.2, P4.3	<ul style="list-style-type: none"> <li>3rd Party user navigates to View Relationships, Pending Acceptance list from Welcome screen</li> <li>3rd Party user navigates to My Account/My 3rd Party Relationships</li> <li>3rd Party user views list of existing 3rd Party relationships</li> </ul>

No change

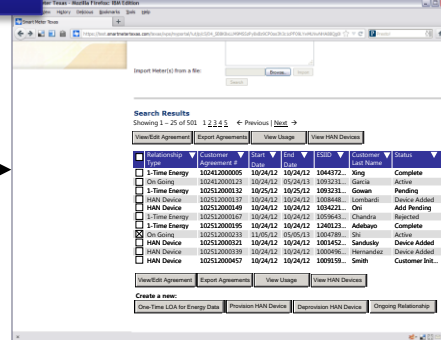
# 3rd Party Views and Manages Ongoing Customer Agreements Storyboard

P4.1



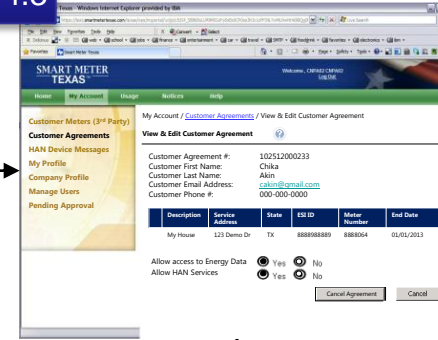
**P4.1** 3rd Party user logs and navigates to My Account / Customer Agreements

P4.2



**P4.2** 3rd Party user views list of existing Customer Agreements

P4.3



**P4.3** 3rd Party user edits Ongoing Agreements

If agreement was modified

P4.4

RES/Business Confirmation Email

**P4.4** SMT sends a confirmation email to the RES/Business user that the agreement has been modified

P4.5

3rd Party Confirmation Email

**P4.5** SMT sends a confirmation email to the 3rd Party user that the relationship has been modified

# 3rd Party Views and Manages Ongoing Customer Agreements

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/ut/p/c5/04\_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0t

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**Customer Meters (3<sup>rd</sup> Party)**

**Customer Agreements**

**HAN Device Messages**

**My Profile**

**Company Profile**

**Manage Users**

**Pending Approval**

My Account / Customer Agreements

**Search for Customer Agreements** ?

\* Indicates a required field.

Choose your search criteria and type in a one or more search items, OR import a list of search items from a file.

\* Select type of agreement search criteria.

☒ Agreement Number(s)

☐ Customer Last Name

☐ ESIID(s)

☐ Meter Number(s)

Type one or more search items:  
(separated by commas)

Import search items from a file:

**P4.1** 3rd Party user logs and navigates to My Account / Customer Agreements



# 3rd Party Views and Manages Ongoing Customer Agreements

**P4.2** 3rd Party user views list of existing Customer Agreements

Smart Meter Texas - Mozilla Firefox: IBM Edition

File Edit View History Delicious Bookmarks Tools Help

Smart Meter Texas

https://test.smartmetertexas.com/texas/wps/myportal/!ut/p/c5/04\_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0I

Import Meter(s) from a file:

**Search Results**

Showing 1 – 25 of 501 1 2 3 4 5 < Previous | Next >

<input type="checkbox"/>	Relationship Type	Customer Agreement #	Start Date	End Date	ESIID	Customer Last Name	Status
<input type="checkbox"/>	1-Time Energy	102412000005	10/24/12	10/24/12	1044372...	Xing	Complete
<input type="checkbox"/>	On Going	102412000123	10/24/12	05/24/13	1093231...	Garcia	Active
<input type="checkbox"/>	1-Time Energy	102512000132	10/25/12	10/25/12	1093231...	Gowan	Pending
<input type="checkbox"/>	HAN Device	102512000137	10/24/12	10/24/12	1008448...	Lombardi	Device Added
<input type="checkbox"/>	HAN Device	102512000149	10/24/12	10/24/12	1034221...	Oni	Add Pending
<input type="checkbox"/>	1-Time Energy	102512000167	10/24/12	10/24/12	1059643...	Chandra	Rejected
<input type="checkbox"/>	1-Time Energy	102512000195	10/24/12	10/24/12	1240123...	Adebayo	Complete
<input checked="" type="checkbox"/>	On Going	102512000233	11/05/12	05/05/13	1004789...	Shi	Active
<input type="checkbox"/>	HAN Device	102512000321	10/24/12	10/24/12	1001452...	Sandusky	Device Added
<input type="checkbox"/>	HAN Device	102512000339	10/24/12	10/24/12	1000496...	Hernandez	Device Added
<input type="checkbox"/>	HAN Device	102512000457	10/24/12	10/24/12	1009159...	Smith	Customer Init...

**Create a new:**

# 3rd Party Views and Manages Ongoing Customer Agreements

## Assumptions:

3<sup>rd</sup> Parties CAN cancel  
'Active' Ongoing  
Customer Agreements

## P4.3 3<sup>rd</sup> Party user edits Ongoing Agreements

Smart Meter Texas - Windows Internet Explorer provided by IBM

https://test.smartmetertexas.com/texas/wps/myportal/ut/p/c5/04\_SB8K8xLLM9MSSzPy8xBz9CP0os3h3c1cPF09LYwMLNwNHA88Qg0t

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**Customer Meters (3<sup>rd</sup> Party)**

**Customer Agreements**

**HAN Device Messages**

**My Profile**

**Company Profile**

**Manage Users**

**Pending Approval**

My Account / [Customer Agreements](#) / View & Edit Customer Agreement

**View & Edit Customer Agreement**

Customer Agreement #: 102512000233

Customer First Name: Chika

Customer Last Name: Akin

Customer Email Address: [cakin@gmail.com](mailto:cakin@gmail.com)

Customer Phone #: 000-000-0000

Description	Service Address	State	ESI ID	Meter Number	End Date
My House	123 Demo Dr	TX	8888988889	8888064	01/01/2013

Allow access to Energy Data ☒ Yes ☐ No

Allow HAN Services ☒ Yes ☐ No

[Cancel Agreement](#) [Cancel](#)

## Questions:

In an 'Active' Ongoing  
Agreement can...

1) 3<sup>rd</sup> Parties request  
ongoing access to  
Energy Usage, if they  
do not have it?

This would lead to a  
process similar to P1

2) 3<sup>rd</sup> Parties request  
access to HAN  
Services if they do  
not already have it?

This would lead to a  
process similar to P1

3) Should Ongoing  
Customer  
Agreements be  
limited to 1 ESIID?  
(even though invites  
can be for more  
than one  
ESIID)

## Additional scope assumptions

- Friends limit will be set back to 5